



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Statewide Facilities, Safety, and Tax Season Manager

Job Code Title

Administrative Services Manager III

Pay Band

6c

Job Code Number

113116

Citizen Services and Resource Management Division

Financial and Asset Management Bureau

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Citizen Services and Resource Management Division administers the accounting, purchasing, safety, security, statewide facility functions, call center, forms design, one-stop business licensing coordination, and receipt and distribution of unclaimed property. The division includes the Financial and Asset Management Bureau and the Citizen Services Bureau. The Financial and Asset Management Bureau is responsible for the accounting and financial management functions of the department including distribution of tax revenues collected, monitoring and payment of department expenses, preparation of budget projections, processing the necessary accounting transactions on the state's financial systems, and analysis of financial transactions impacting the department. The bureau also coordinates the department's purchasing functions and resolves matters regarding safety, security, and facilities for department employees and the agency's office locations statewide.

Job Responsibilities

The Statewide Facilities, Safety, and Tax Season Manager is responsible for developing and implementing taxpayer outreach projects during tax season; coordinating security and disaster preparedness plans that include continuity of government and operations; and managing facilities programs statewide. This involves consultation with department managers, employees, contractors, vendors, public safety agencies, and other state agencies; monitoring the unit budget; and maintaining awareness of budgetary constraints of other divisions and units. The position reports to the division administrator and is responsible for supervision of unit staff.

- **Staff Leadership, Management, and Supervision 25%**

The incumbent is responsible for leading staff and managing the day-to-day activities of the department's statewide facilities, safety, and security programs statewide. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.

2. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
3. Maintains an atmosphere of safety within the unit. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
4. Makes and accepts responsibility for decisions necessary to carry out the unit's mission.
5. Accepts direction and feedback from supervisors and follows through appropriately.

Management

1. Conducts strategic planning in coordination with the division administrator to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; unit needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, unit performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.
9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the unit follows department expectations regarding disclosure and employee confidentiality.

Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.
3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.

4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, procedures.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

- **Statewide Facilities Management 35%**

The incumbent manages the department's various facilities located in Helena and in all 56 counties

1. Determines division and department procurement needs. Develops specifications; coordinates request for proposal (RFP) processes; ensures compliance with department procurement practices; develops EPP budget justifications; and submits requests.
2. Participates in IRS safeguard reviews by working closely with disclosure officer on a regular basis and performing internal inspections to ensure federal security requirements are met.
3. Manages the department's rental budget. Ensures the department is being charged fair rental rates on statewide facilities. Researches rates on rental space in the various localities and overseeing rental agreements.
4. Oversees new construction or remodeling of existing facilities statewide. Ensures work is completed on time and on budget by working with the various agencies and contractors and monitoring costs and schedules. Analyzes plans for compliance with Americans with Disabilities Act (ADA) requirements. Evaluates contractor and equipment facilities contracts for compliance with ADA and other requirements.
5. Provides cost analyses on all office furniture and department equipment purchases by researching options and providing recommendations and direction to leadership based on the results of the analyses.
6. Represents the department on issues relating to risk for employees and property with the Department of Administration's Risk Management and Tort Defense Division (RMTD) to reduce losses. Builds a knowledge base of each division's business and areas of potential risk. Communicates and helps to enforce RMTD's policies, rules, and procedures within the department. Encourages key department personnel to attend various subject matter training.
7. Assists accounting staff and budget analyst by providing information for billing, budget projections, and budget submissions relating to all equipment, leases, projects and plans including phones, computer, mainframe leases, vehicles, photo copiers, remodeling projects, long range building plans, and one-time-only expenses as they relate to facilities for various divisions.

- **Tax Season Team Coordinator 15%**

The incumbent plans, executes, and finalizes taxpayer outreach projects related to forms, services, assistance, training, and communications.

1. Acquires resources and coordinates the efforts of department employees, key stakeholders, volunteers, local offices, and advertising and marketing to deliver projects as planned. Defines the project's objectives and oversees quality control throughout the project life cycle. Ensures statistics are readily available during peak processing periods.

2. Acts as the project coordinator for the tax season team each income tax filing period. Evaluates programs to identify and recommend new approaches to education, information technology, processing, and related tax season activities. Analyzes prior year statistics to determine areas that need additional focus. Maintains a log of lessons learned to determine the impact of public awareness communications and the media used. Makes modifications as indicated to reach the intended audience.
3. Assesses the effectiveness of programs and projects and their impact on revenue services and compliance. Determines areas to improve program efficiency and enhance efforts. Assesses program utilization and effectiveness. Determines program modifications necessary to improve services. Reviews information from the public and other agencies. Assesses current policies and their effect on program operations. Identifies areas affected by new policies. Delegates program assignments and reviews policy recommendations from unit staff.
4. Evaluates the effects of proposed legislation on tax forms, related services and assistance, and training and communication. Coordinates with other department staff and other agencies to develop strategies for responses to proposed changes by reviewing legislation to identify the effects on current practices and procedures.
5. Works with department business and legal staff to ensure appropriate changes are made for compliance purposes. Assists with developing training needs for staff and temporary tax season resources.

- **Department Safety and Security and Disaster Preparedness Coordination 20%**

The incumbent coordinates and maintains the department's security planning and disaster preparedness plans at all locations statewide and ensures that planning involves all appropriate parties.

1. Coordinates and meets with various state and local officials to gather infrastructure and potential hazard analysis information for each location. Identifies the key officials and facilitating meetings with them. Ensures that appropriate and essential information is gathered.
2. Oversees the development of continuity of operation plans that involve key department personnel, other state agency personnel, and other entities. Establishes performance measures. Provides guidance and technical assistance as needed. Ensures the ongoing efficiency, effectiveness, accuracy, and compliance of operations in the face of disasters or emergencies.
3. As the department liaison, works with outside entities to plan and implement response and recovery phases for natural, technological, national, and local security disasters and emergencies. Seeks out and participates in group and individual conversations, makes regular site visits, and attends conferences to share knowledge and expertise.
4. Represents the department on issues relating to Continuity of Government and Continuity of Operations by giving presentations, attending meetings, and providing information and education on disaster management and recovery.
5. Creates emergency action plans (EAP) and modifies them as needed for all locations statewide. Works with site coordinators on a regular basis to ensure that teams are actively trained, performing drills, and that plans are up to date.
6. Facilitates exercises and drills to provide training to all occupants including the site coordinators. Communicates plan changes and other news to coordinators and all building occupants related to emergency preparedness. Observes and participates in the exercises and drills to identify areas of improvement and motivate teams to work together efficiently.
7. Determines the safety and security training needs of all department staff through analysis of program effectiveness, new technology, policies, and staff performance during drills and emergencies. Ensures consistency in the application of training opportunities statewide. Coordinates and trains staff on various aspects of the EAP and challenges site coordinators to develop as leaders for their buildings.
8. As the first point of contact for incidents that affect department employees or facilities, organizes the immediate response to situations and contacts the director and initiates contingency plans.

9. In the event a security or evacuation problem occurs, the incumbent is the first person responsible for defusing the situation. In the event of an evacuation, the incumbent's primary responsibility is to make sure that all employees are out of the building with the incumbent being the last to leave.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the supervisor.
2. Acts for the supervisor as assigned.

Job Requirements

To perform successfully as a facilities, safety, and tax season manager, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team, make sound decisions and be accountable for them, generate innovative ideas, and have personal initiative. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information.

This position requires knowledge of emergency planning principles and practices; continuity of government and operations planning; infrastructure and hazard analysis information; occupational safety principles; facilities planning; security; and office management. This position requires knowledge of general management practices including strategic planning; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program planning; quality assurance methods; organizational development; project management; governmental organizational structure, accounting, and budgeting; statutes; and legislative and administrative rule processes and guidelines. The work also requires knowledge of computers and database management including state and department information systems (GenTax, SABHRS); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; business communications; records management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in public administration, business administration, occupational health and safety, or related field and four years of job-related work experience in safety, planning, and security.
 - Work experience should include a minimum of two years of supervisory experience. Tax experience preferred.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for

their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.

- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the unit. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. May involve minimal travel therefore a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. Occasionally the incumbent may be called upon to assist in lifting heavier items up to 30 pounds. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Steve Austin, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____

Date: _____

Name (print): _____